



## Module 6

# Getting to Know the Travelers along the Way Gathering Information, Intake & Referral, and Building Resources

## **Record of the Journey**

#### **Documentation of Portfolio Results**

Name of participant	
Program affiliation (including district)	
Address	
Phone number (with area code)	E-mail address
Signature(s), affiliation, address, phone number	ber, and e-mail address of person(s) documenting results:
Date completed and approved	
Date completed and approved	

#### Module 6

# Getting to Know the Travelers along the Way Gathering Information, Intake & Referral, and Building Resources

## **Record of the Journey**

### **Documentation of Portfolio Results**

Assignment/Activity	Measure of Achievement	Date Assigned	Date Successfully Completed	Comments
Module Description				
Note that the contents of this module are divided into three components: (1) Gathering Information, (2) Intake & Referral, and (3) Building Resources.				
6.1 Gathering Information	Active participation in			
View PowerPoint <i>Gathering Information</i> (slides 1-13), engaging in discussion as directed.	discussion and activities during PowerPoint as led by the trainer.			
6.2 Routines-Based Interview	Independent outside			
The routines-based interview is a powerful component in the process of intervention planning. If your district/agency chooses to	assignment. Review of materials as			

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incorporate this into practice, the trainer will complete the three activities presented here during formal training with the learner(s). Since this will add significant additional time necessary to complete this module, the trainer may choose to complete these activities at a separate training date and time. There are associated practices tied to the routines-based interview that are not included in this brief activity. To ensure understanding of this model, the trainer may consider the following:	requested and placement in portfolio.			
Training and technical assistance For keynote presentations, conference sessions, workshops, or site-specific technical assistance, contact Robin McWilliam Robin.McWilliam@Vanderbilt.edu In addition to Dr. McWilliam, an international network of colleagues, former students and staff, trainers, faculty, and program directors that have experience with Dr. McWilliam's model are available.				
Service coordinators benefit from learning about the routines-based interview. All participants should complete the following activities independently outside of formal				

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training time for this module, if they are not included in formal training as described above.				
Step 1 Review the content from the article, Functional Intervention Planning: The Routines-Based Interview (6.2a).				
Step 2 View the video to observe Dr. Robin McWilliam as he demonstrates this activity. Video—Routines-Based Interview (RBI) 45-minute video example of an interview for developing an IFSP with a family.				
Step 3 Review 6.2b Routines-Based Interview Form. Place the above article and form in the portfolio guide after review.				
If this step is completed during formal training, role-play with the trainer a brief interview, using the interview form for recording information, and place in				

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portfolio guide.				
6.3 Gathering Information Pre-Quiz	Pre-quiz completion.			
Complete the pre-quiz. Give to trainer upon completion.				
6.4 Case example—Jack	Active participation in			
View PowerPoint Gathering Information (slides 14-16).	discussion and activities during			
Develop a list of questions that might be used during the conversation with Susan and Gayle at the initial meeting.	PowerPoint as led by the trainer.			
Record your questions on worksheet 6.4a, and place in portfolio upon completion.	Satisfactory listing of interview questions on			
View slides 17-24. Participate as directed by the trainer.	worksheet 6.4, as determined by the trainer. Worksheet placed in portfolio.			
6.5 Ask Mrs. Yonkers	Active participation			
View slides 25-28 of the PowerPoint, reading	and			
the questions posed. Indicate whether you	completion of			

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feel the question is important to ask Mrs.	activity as			
Yonkers.	directed by the			
	trainer.			
After the participant(s) make their decision, go				
to slides 29-38 to find out what Mrs. Yonkers				<del></del>
thinks.	Improved			
6.6 Gathering Information Post-Quiz	Improved score on post-			
Complete the post-quiz. Compare your	quiz compared			<del></del>
results to your own pre-quiz, and file both in	to score on			<del></del>
the portfolio.	pre-quiz.			
6.7 Intake & Referral Pre-Test	Completion of			
	pre-test.			
Complete the pre-test.				
6.8 Intake & Referral	Active			<u> </u>
	participation in			
View PowerPoint <i>Intake and Referral</i> (slides	brief			<u> </u>
1-17), engaging in brief discussion as advised.	discussion as			<del></del>
advised.	directed by the trainer.			<del></del>
6.9 Describing Tennessee's Early	Active			
Intervention System	participation in			
	activity to the			
Using the intake flipchart Tennessee's Early	satisfaction of			
Intervention System, work in pairs as	the trainer.			
instructed. One person will play the role of				
the family member and the other person will				
play the role of the service coordinator.				

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Practice presenting the information as you would to a family. Switch roles if time allows.				
6.10 Intake Checklists	Follow-up with trainer or other			
Read the three checklists outside of training. Follow-up with the trainer or appropriate person in your office with any questions about these procedures.	appropriate person in the office for resolution of			
Place these checklists in a notebook to be	any questions.			
used as a quick reference as long as needed.	Verification by trainer of notebook containing checklists 6.10a, 6.10b, and 6.10c.			
6.11 Form Review	Active participation			
Participate as directed in review of forms related to intake and referral.	as directed by the trainer.			
6.12 Intake Field Observation	Satisfaction of the trainer			
Arrange an appointment to accompany an experienced service coordinator on in intake	based on follow-up			
visit. Complete the observation form (6.12) following the visit. Share the results with the trainer for discussion and feedback, and place	discussion using observation			

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the form in the portfolio.	form.			
6.13 TEIS Overview	Awareness of			
	optional child			
If recommended by the trainer, review this	find and public			
PowerPoint outside of training. See note	awareness			
pages of PowerPoint for suggested dialogue.	tool.			
6.14 More Rules for the Road Intake &	Improvement			
Referral Post-Test	in number of			
	correct			
Complete the post-test. Compare your	responses			
performance with your results on the pre-test.	based on pre-			
	and post-test			
	results, to the			
	satisfaction of			
0.45 D. W.C. D. D	the trainer.			
6.15 Building Resources	Active			
View Dewar Deigh Dwilding Deserves delides	participation in			
View PowerPoint <i>Building Resources</i> (slides	brief discussion as			
1-5), engaging in brief discussion as directed.	directed by the			
	trainer.			
6.16 Building Resources Web Assignment	Satisfactory			
0.10 Building Resources Web Assignment	completion of			
It is essential that service coordinators know	research and			
how to access information and resources of	development			<del></del>
use to families. This assignment will take time	of research			
to do the appropriate research, and should be	guide to be			
done outside of formal training time.	included in the			

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<ol> <li>Please complete these steps:         <ol> <li>Visit the websites found on assignment sheet Building Resources Web</li></ol></li></ol>	portfolio. Copy should be available for use by the participant in their work.			
<ul> <li>where appropriate.</li> <li>3. Place your information in a folder/notebook (or on index cards in a file box), and give to your trainer/supervisor for their approval.</li> <li>4. Place a copy of this information in your portfolio. (If you choose to keep this information on index cards, a written statement of satisfactory completion of this activity can be placed in your</li> </ul>				
portfolio by your trainer/supervisor.)				
6.17 Building Resources in Everyday Routines, Settings, and Activities	Complete list of ten specific settings that			

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Identify ten <b>specific</b> typical settings in your local area that serve to promote the	are appropriate for			
development and success of infants and	promoting the			
toddlers. If you are new to the area, you might need to talk to other service	development of infants and			
coordinators or families in order to learn what	toddlers,			
is available in the counties you serve. If you are serving multiple counties, try to include	county- specific if			
examples from each county. Upon	appropriate.			
completion, share this with your trainer/supervisor, and place a copy in your				
portfolio.				
6.18 Building Local Resources, Brochures, & Observations	Completion of assigned			
,	review of			
<ol> <li>Review <i>TEIS Directory of Services</i>.</li> <li>Carefully read brochures provided by the</li> </ol>	directory and brochures.			
trainer to familiarize yourself with local				
<ul><li>area service providers.</li><li>3. Arrange to meet with and/or observe 3-5</li></ul>	Completion of assigned			
key providers of services to children and	observations			
families in your area completing Service  Provider Information-Observation forms	and forms.			
(6.18a) as directed.	Follow-up discussion			
The trainer/europaire and illumentate at	with the trainer			
The trainer/supervisor will provide contact information to facilitate scheduling these	completed as directed.			
observations. Afterwards schedule a time	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2			

Assignment/Activity	Measure of Achievement	Date Assigned	Date Successfully Completed	Comments
to discuss your observations with the trainer/supervisor or their designee (other experienced service coordinator).				
Obviously, families would need to be informed and give their consent as appropriate.				
Additional comments	1		1	
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